

Finalizing Claims and Interactions

Issue: Denying an Interaction. Authorizing claims, partial coverage claims, ordering sourced parts. Resolution:

1. Denying an interaction. After following SOP “How to Start a Claim or Log an Interaction” and you have determined using Forte contract that parts are not listed for coverage you must:
 - a. Note **“Create Concern”** screen in detail for each **PNLC** item.
 - b. How that part failed.
 - c. Add **[Claim Note]** in the notes:
 - i. Note who you spoke with.
 - ii. Information provided about **PNLC**.
2. Verify information is correct. Click **[Next]**.
 - a. Advised RF of details of **PNLC**.
 - b. Then call CH to go over coverage:
 - i. Speak with the CH.
 - ii. Leave a detailed voicemail.
3. Verify interaction call details and select **[Reasons]** drop down for reasons why a claim is not to be started and select, then click **[Save & Next]**.
4. After following SOP: “Parts Verification”, SOP “Labor Hour Verification Process” and we have contract coverage to authorize the claim.
5. Start by selecting the parts and labor eligible to the RF in the **[Unauthorized]** screen. Then you will click authorize.
6. The authorized summary screen will populate to go over totals with the RF for parts, labor, and deductible. Click **[Authorize]** to get an authorization number.
7. After authorizing the claim, the estimate will move to **[Authorized/Cancelled]**.
8. Now that you have contract coverage you will need to add an authorization note, start by clicking **[Actions]**, then click **[Notes]**, click **[Add Note]**. Select **[Authorize Note]** as the category. Make sure to include the following. This can be done in more than one authorization note
 - a. How you verified failures.
 - b. What part is being authorized (**RF part or sourced**).
 - c. Who you gave authorization too.
 - d. Verified payment information on file is correct
 - e. Calling CH for OOP
9. RF authorization number can be found on the **[Authorizations]** tab.
10. After giving authorization number to RF advise how to submit for payment.
11. Advise the following must be on the final invoice:
 - a. CH name matching contract
 - b. Full VIN number
 - c. Part numbers for all parts called in
 - d. Labor per repair
 - e. Faxed or emailed

Authorizing with Denied Parts:

12. After following SOP: “Parts Verification”, SOP: “Labor Hour Verification Process” and we have contract coverage to authorize the claim.
13. Start by selecting parts and labor not eligible to the RF in the [unauthorized] screen. Then you will click **[Deny]**.

Finalizing Claims and Interactions

14. Verify denied totals and select **[Denial Reasons]** drop down and scroll down for reasons why a claim is not eligible and select, then click **[Deny]**.
15. Estimate line items are now in the “denied” section of the **[Estimate]** tab, with eligible parts still in the “Unauthorized” section.
16. Select parts, labor, and deductible eligible to the RF in the **[Unauthorized]** screen. Then you will click **[Authorize]**.
17. Review authorization summary “details” screen, then click **[Authorize]**.
18. An “Authorize screen” will then populate giving a full breakdown of coverage to go over the authorization with the RF.
19. Go back to steps 8-11 and finalize authorization with the RF.

Authorization with Ordering Sourced Parts:

20. After following SOP: “Parts Verification”, SOP: “Labor Hour Verification Process” and we have contract coverage to authorize the claim with ordering sourced part.
21. Start by selecting parts, labor, and deductible eligible to the RF in the **[Unauthorized]** screen. Then you will click **[Authorize]**.
22. Review authorization summary details screen, then click **[Authorized]**.
23. Now you have an authorized estimate to go over totals with the RF for labor and deductible. Here is where you go over parts options WITHOUT authorizing the part to the supplier.
24. If the RF allows parts to be shipped in and you have spoken directly with the CH to get approval to ship parts for repairs. Click **[Parts]** to find the sourced part/s, select part/s sourced and click **[Order part]**.
25. A confirm order screen will populate, to complete order you must click **[Save]** to order part.
26. To verify part was ordered refresh the claim and click **[Estimate]** tab and click **[Authorized/Cancelled]** section. Where will you now see part order from supplier.
27. Now go back to steps 8-11 and finalize authorization with RF.

Related References and Documents:

SOP: Finalizing Claims and Interactions Claims

SOP: Parts Verification Claims

SOP: Labor Hour Verification Claims

Author Date: 06/28/2023

Purpose

This SOP is intended to outline the steps taken in denying an interaction. It also outlines how to authorize claims with repair facilities parts, with denied parts, and with ordering sourced parts.

Teams Impacted

- Small Claims
- General Claims
- Technical Claims

Related References or Documents

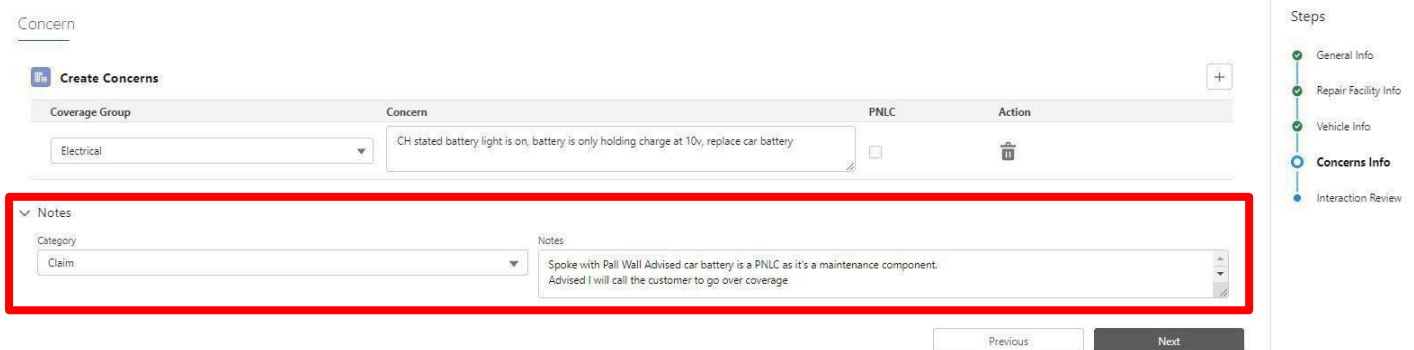
- SOP: How to start a claim/ interaction.
- SOP: Parts Verification
- SOP: Labor Verification

Procedure

Denying an Interaction

Important! Only parts not listed for coverage can be denied in an interaction. If the part is listed for coverage a claim **MUST** be started.

1. After following SOP: How to Start a Claim or Log Interaction and you determine based off Forte that contract parts are not listed for coverage you must:
 - a. Note in the Create Concern screen in detail each part not listed for coverage
 - b. How that part failed
 - c. Add **[Claim Note]** in the notes:
 - i. Note who you spoke with
 - ii. Information provided about PNLC



Concern

Create Concerns

Coverage Group	Concern	PNLC	Action
Electrical	CH stated battery light is on, battery is only holding charge at 10v, replace car battery		

Notes

Category: Claim

Notes: Spoke with Pall Wall Advised car battery is a PNLC as it's a maintenance component. Advised I will call the customer to go over coverage

Previous Next

Steps

- General Info
- Repair Facility Info
- Vehicle Info
- Concerns Info
- Interaction Review

2. Verify information is correct. Then you must complete (see below) before clicking **[Next]**
 - a. Advised repair facility of details of PNLC
 - b. Then call the CH to go over coverage
 - i. Speak with the contract holder
 - ii. Leave a detailed voicemail

Concern

Create Concerns

Coverage Group	Concern	PNLC	Action
Electrical	CH stated battery light is on, battery is only holding charge at 10v, replace car battery	<input type="checkbox"/>	

Notes

Category

Claim

Notes

Spoke with Pall Wall Advised car battery is a PNLC as it's a maintenance component.
 Advised I will call the customer to go over coverage
 Called Ch they understand or Left voicemail of coverage

Previous

Next

Steps

- General Info
- Repair Facility Info
- Vehicle Info
- Concerns Info**
- Interaction Review

3. Verify interaction call details and select **[Reasons drop down]** scroll down for reasons why a claim is not to be started and select, then click **[Save & Next]**

Interaction Review

General Info

Are you the contract owner?

Yes No

Are you a Repair Facility?

Yes No

Repair Facility

75217 PEP BOYS - 1710 S BUCKNER BLVD DALLAS TX 75217 USA

Concerns Info

Coverage Group

Electrical

Note

CH stated battery light is on, battery is only holding charge at 10v, replace car battery

PNLC

false

Notes

Category

Claim

Notes Text

Spoke with Pall Wall Advised car battery is a PNLC as it's a maintenance component.
 Advised I will call the customer to go over coverage
 Called Ch they understand or Left voicemail of coverage

Vehicle Info

Current Mileage

42156

Breakdown Date

09/22/2023

Car at Repair Facility?

Yes No

Driven or Towed In?

Driven Towed In

Diagnoses Performed?

Yes No

Problem Duplicated?

Yes No

Would you like to open a Claim?

Yes No

Reason

-- Clear --
 PNLC
 Part excluded (specific to Diamond)
 Waiting period
 Vehicle not at RF

Previous

Save & Next

Steps

- General Info
- Repair Facility Info
- Vehicle Info
- Concerns Info
- Interaction Review**

Authorizing Claims

4. After following SOP: Parts Verification, SOP: Labor hour Verification process and we have contract coverage to authorize the claim.
5. Start by selecting parts and labor eligible to the repair facility in the **[Unauthorized]** screen. Then you will click **[Authorize]**.

SOP: Finalizing Claims and Interactions

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Locked by Johnnie Martinez (8m 55s)

Add Claim Item Modify Claim Item Refresh

Authorize Deny Source Parts

Parts Authority

Remaining LOL : \$10,000.00

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
<input checked="" type="checkbox"/> Authorized/Cancelled										
No authorized or cancelled items.										
<input checked="" type="checkbox"/> Denied										
No denied items.										
<input checked="" type="checkbox"/> Unauthorized										
<input checked="" type="checkbox"/>		Drive Axle	Cv Axle Complete - Driver Side	Yes	1	\$387.27	\$387.27	PEP BOYS	Repair Facility	Unauthorized
<input checked="" type="checkbox"/>		Drive Axle	Cv Axle Complete - Passenger Side	Yes	1	\$387.27	\$387.27	PEP BOYS	Repair Facility	Unauthorized
<input checked="" type="checkbox"/>		Drive Axle	Labor-Drive Axle	Yes	1.3	\$120.90	\$120.90	PEP BOYS	Repair Facility	Unauthorized
<input checked="" type="checkbox"/>		Drive Axle	Labor-Drive Axle	Yes	1.3	\$120.90	\$120.90	PEP BOYS	Repair Facility	Unauthorized
<input checked="" type="checkbox"/>		Deductible	Deductible			-\$100.00	-\$100.00	PEP BOYS	Repair Facility	Unauthorized
		Sub Total				\$916.34	\$916.34			
		Grand Total				\$916.34	\$916.34			

6. The authorized summary screen will populate to go over totals with the repair facility for parts, labor, and deductible. Click **[Authorize]** to get the authorization number.

Authorize

Locked by Johnnie Martinez (2m 15s)

Payee Type	Payee Name	Expense Type	Tax	Total
Repair Facility	PEP BOYS	Part	\$0.54	\$774.54
Repair Facility	PEP BOYS	Labor	\$0.00	\$241.80
Repair Facility	PEP BOYS	Deductible	\$0.00	-\$100.00
Repair Facility Subtotal			\$0.54	\$916.34
Repair Facility Total				\$916.34
Other Total				\$0.00
Claim Total				\$916.34
Remaining LOL				\$9,083.66

Authorize

7. After authorizing the claim, the estimate will move to **[Authorized/Cancelled]**.

Related
Details
Interactions
Estimate
Notes
Parts
Authorizations
Payable

Claim Available

Add Claim Item
Modify Claim Item
Refresh

Authorize
Deny
Source Parts

Parts Authority

Remaining LOL : \$9,083.66

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status	
<input checked="" type="checkbox"/> Authorized/Cancelled											
<input type="checkbox"/>	A300000267	Drive Axle	Cv Axle Complete - Driver Side	Yes	1	\$387.27	\$387.27	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/>	A300000267	Drive Axle	Cv Axle Complete - Passenger Side	Yes	1	\$387.27	\$387.27	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/>	A300000267	Drive Axle	Labor-Drive Axle	Yes	1.3	\$120.90	\$120.90	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/>	A300000267	Drive Axle	Labor-Drive Axle	Yes	1.3	\$120.90	\$120.90	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/>	A300000267	Deductible	Deductible			-\$100.00	-\$100.00	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
		Sub Total				\$916.34	\$916.34				
		Grand Total				\$916.34	\$916.34				

☒ Denied

No denied items.

☒ Unauthorized

8. Now that you have Contact coverage you will need to add an Authorization Note, start by clicking **[Actions]**, then click **[Notes]**, click **[Add Note]**. Select **[Authorized Note]** as the category. Make sure to include the following (see below). This can be done on more than one authorization note.
- How you verified failures
 - What part is being Authorized (Repair facility part or sourced)
 - OOP Breakdown If applicable (note where the difference is parts/labor)
 - Call customer to go over OOP if applicable
 - Who you gave authorization to
 - Verified Payment information on file is correct

Category

Authorize Note

Notes

Authorizing claim
Verified failures for the compressor based off reading from the RF diagnosis
Verified failure to the condenser, pictures sent in with metal in the system
Using RF parts at MSRP which RF quoted prices at - No OOP difference on parts
Difference on labor due to verifying 5.2 hours of labor total - difference in labor is due to RF requesting 2.1 hours over what was verified
CH has OOP cost of \$240 + \$100 deductible due to difference in labor
Called CH and went over OOP, CH approved OOP cost and advised to move claim forward
Gave authorization to Joe Schmoe and verified payment email of joe.schmoe@cms.com

14. Verify denied totals and select **[Denial Reasons drop down]** scroll down for reasons why a claim is not eligible and select, then click **[Deny]**

Deny Claim Items

Claim Available

Payee Type	Payee Name	Expense Type	Tax	Total
Repair Facility	19090 PEP BOYS	Part	\$0.00	\$238.35
Repair Facility	19090 PEP BOYS	Labor	\$0.00	\$85.05
Repair Facility Subtotal			\$0.00	\$323.40
Repair Facility Total				\$323.40
Other Total				\$0.00
Claim Total				\$323.40
Remaining LOL				\$22,026.60

Denial Reason

*Select an Option...

- PNLC
- Part excluded
- Damaged by a PNLC
- TSB/Product Update
- Manufacturing Defect
- Continued operation
- Pre-existing failure
- Incorrect Fluid Level
- Overheating/Sludge/Carbon/Conta...

Deny

Amount	Payee Name	Payee Type	Expense Type	Reason
\$232.96	19090 PEP BOYS	Repair Facility	Part	Unauthorized
\$85.05	19090 PEP BOYS	Repair Facility	Labor	Unauthorized
\$122.85	19090 PEP BOYS	Repair Facility		Unauthorized
-\$100.00	19090 PEP BOYS	Repair Facility		Unauthorized
\$579.21				
\$579.21				

15. Estimate line items are now in the Denied section of **[Estimate]** tab, with eligible parts still in unauthorized section.

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Locked by Johnnie Martinez (6m 4s)

Add Claim Item Modify Claim Item Refresh

Authorize Deny Source Parts

Parts Authority

Remaining LOL : \$22,350.00

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
Authorized/Cancelled										
Denied										
<input type="checkbox"/>		Drive Axle	Cv Axle Complete - Driver Side	Yes	1	\$238.35	19090 PEP BOYS	Repair Facility		Denied
<input type="checkbox"/>		Drive Axle	Labor-Drive Axle	Yes	0.9	\$85.05	19090 PEP BOYS	Repair Facility		Denied
		Sub Total				\$323.40				
		Grand Total				\$323.40				
Unauthorized										
<input checked="" type="checkbox"/>		Drive Axle	Cv Axle Complete - Passenger Side	Yes	1	\$232.96	19090 PEP BOYS	Repair Facility		Unauthorized
<input checked="" type="checkbox"/>		Drive Axle	Labor-Drive Axle	Yes	1.3	\$122.85	19090 PEP BOYS	Repair Facility		Unauthorized
<input checked="" type="checkbox"/>		Deductible	Deductible			-\$100.00	19090 PEP BOYS	Repair Facility		Unauthorized
		Sub Total				\$255.81				

16. Select parts, labor and deductible eligible to the repair facility in the **[Unauthorized]** screen. Then you will click **[Authorize]**

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Locked by Johnnie Martinez (6m 4s)

Add Claim Item Modify Claim Item Refresh

Authorize Deny Source Parts

Parts Authority

Remaining LOL : \$22,350.00

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status	
Authorized/Cancelled											
Denied											
<input type="checkbox"/>		Drive Axle	Cv Axle Complete - Driver Side	Yes	1	\$238.35	\$238.35	19090 PEP BOYS	Repair Facility		Denied
<input type="checkbox"/>		Drive Axle	Labor-Drive Axle	Yes	0.9	\$85.05	\$85.05	19090 PEP BOYS	Repair Facility		Denied
		Sub Total				\$323.40	\$323.40				
		Grand Total				\$323.40	\$323.40				
Unauthorized											
<input checked="" type="checkbox"/>		Drive Axle	Cv Axle Complete - Passenger Side	Yes	1	\$232.96	\$232.96	19090 PEP BOYS	Repair Facility		Unauthorized
<input checked="" type="checkbox"/>		Drive Axle	Labor-Drive Axle	Yes	1.3	\$122.85	\$122.85	19090 PEP BOYS	Repair Facility		Unauthorized
<input checked="" type="checkbox"/>		Deductible	Deductible			-\$100.00	-\$100.00	19090 PEP BOYS	Repair Facility		Unauthorized
		Sub Total				\$255.81	\$255.81				

17. Review authorization summary details screen, then click **[Authorized]**

Authorize

Locked by Johnnie Martinez (5m 25s)

Payee Type	Payee Name	Expense Type	Tax	Total
Repair Facility	19090 PEP BOYS	Part	\$0.00	\$232.96
Repair Facility	19090 PEP BOYS	Labor	\$0.00	\$122.85
Repair Facility	19090 PEP BOYS	Deductible	\$0.00	-\$100.00
Repair Facility Subtotal			\$0.00	\$255.81
Repair Facility Total				\$255.81
Other Total				\$0.00
Claim Total				\$255.81
Remaining LOL				\$22,094.19

Authorize

18. Here is the full breakdown of coverage to go over auth with repair facility.

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Locked by: Johnnie Martinez (0m 8s)

Remaining LOL : \$22,094.19

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
<input checked="" type="checkbox"/> Authorized/Cancelled										
<input type="checkbox"/> A300000268	Drive Axle	Cv Axle Complete - Passenger Side	Yes	1	\$232.96	\$232.96	19090 PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/> A300000268	Drive Axle	Labor-Drive Axle	Yes	1.3	\$122.85	\$122.85	19090 PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/> A300000268	Deductible	Deductible			-\$100.00	-\$100.00	19090 PEP BOYS	Repair Facility	Dec 03, 22	Authorized
	Sub Total				\$255.81	\$255.81				
	Grand Total				\$255.81	\$255.81				
<input checked="" type="checkbox"/> Denied										
<input type="checkbox"/>	Drive Axle	Cv Axle Complete - Driver Side	Yes	1	\$238.35	\$238.35	19090 PEP BOYS	Repair Facility		Denied
<input type="checkbox"/>	Drive Axle	Labor-Drive Axle	Yes	0.9	\$85.05	\$85.05	19090 PEP BOYS	Repair Facility		Denied
	Sub Total				\$323.40	\$323.40				
	Grand Total				\$323.40	\$323.40				
<input checked="" type="checkbox"/> Unauthorized										

19. Now go back to step 8-11 and finalize authorization with repair facility.

Authorization with Ordering Sourced Parts

20. After following SOP: Parts Verification, SOP: Labor Hour Verification Process and we have contract coverage to authorize the claim with ordering sourced part.

21. Start by selecting parts, labor and deductible eligible to the repair facility in the **[Unauthorized]** screen. Then you will click **[Authorize]**

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Claim Available

Remaining LOL : \$10,000.00

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
<input checked="" type="checkbox"/> Authorized/Cancelled										
No authorized or cancelled items.										
<input checked="" type="checkbox"/> Denied										
No denied items.										
<input checked="" type="checkbox"/> Unauthorized										
<input checked="" type="checkbox"/>	Engine	Labor- Diagnosis	Yes	0.6	\$56.40	\$56.40	PEP BOYS	Repair Facility		Unauthorized
<input checked="" type="checkbox"/>	Engine	Labor-Engine	Yes	4.4	\$413.60	\$413.60	PEP BOYS	Repair Facility		Unauthorized
<input type="checkbox"/>	Engine	Water Pump	Yes	1	\$135.28	\$291.67	Supplier			Unauthorized
<input checked="" type="checkbox"/>	Deductible	Deductible			-\$100.00	-\$100.00	PEP BOYS	Repair Facility		Unauthorized
	Sub Total				\$505.28	\$661.67				
	Grand Total				\$505.28	\$661.67				

22. Review authorization summary details screen, then click **[Authorized]**

Authorize Locked by Johnnie Martinez (9m 25s)

Payee Type	Payee Name	Expense Type	Tax	Total
Repair Facility	PEP BOYS	Labor	\$0.00	\$470.00
Repair Facility	PEP BOYS	Deductible	\$0.00	-\$100.00
Repair Facility Subtotal			\$0.00	\$370.00
Repair Facility Total				\$370.00
Other Total				\$0.00
Claim Total				\$370.00
Remaining LOL				\$9,630.00

Authorize

23. Now you have authorized estimate to go over totals with the repair facility for labor, and deductible. Here is where you go over part options **WITHOUT** authorizing the part to supplier.

Locked by Johnnie Martinez (3m 57s)

Add Claim Item
Modify Claim Item
Refresh

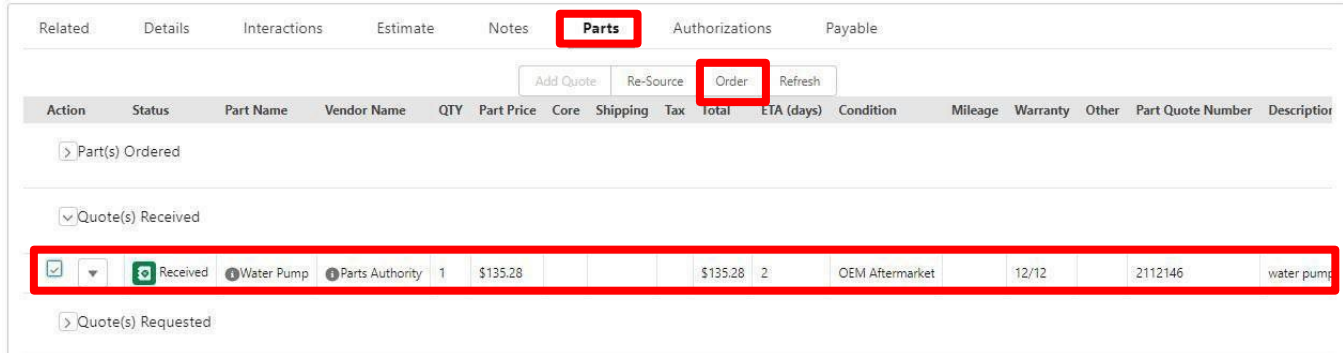
Authorize
Deny
Source Parts

Parts Authority

Remaining LOL : \$9,630.00

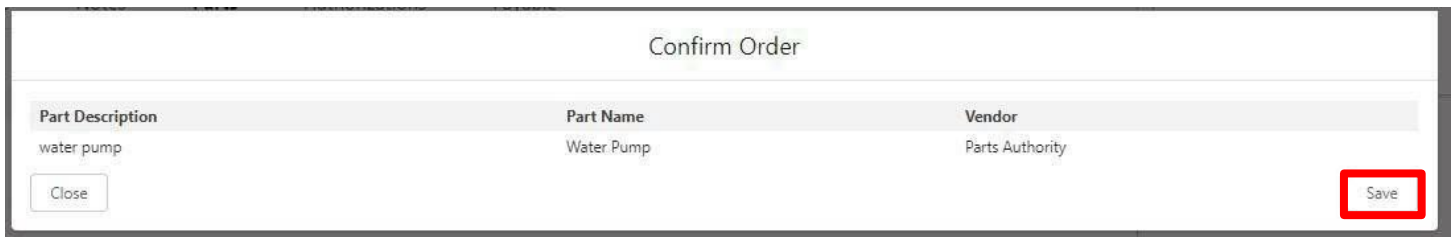
Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
<input checked="" type="checkbox"/> Authorized/Cancelled										
<input type="checkbox"/>	A300000269	Engine	Labor- Diagnosis	Yes	0.6	\$56.40	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/>	A300000269	Engine	Labor-Engine	Yes	4.4	\$413.60	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input type="checkbox"/>	A300000269	Deductible	Deductible			-\$100.00	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
		Sub Total				\$370.00				
		Grand Total				\$370.00				
<input checked="" type="checkbox"/> Denied										
No denied items.										
<input checked="" type="checkbox"/> Unauthorized										
<input type="checkbox"/>		Engine	Water Pump	Yes	1	\$135.28		Supplier		Unauthorized
		Sub Total				\$135.28				

24. If repair facility allows parts shipped in and you have spoken directly with customer to get approval to shipped parts for repairs. Click **[Parts]** to find the sourced part/s, select part/s sourced click **[Order Parts]**



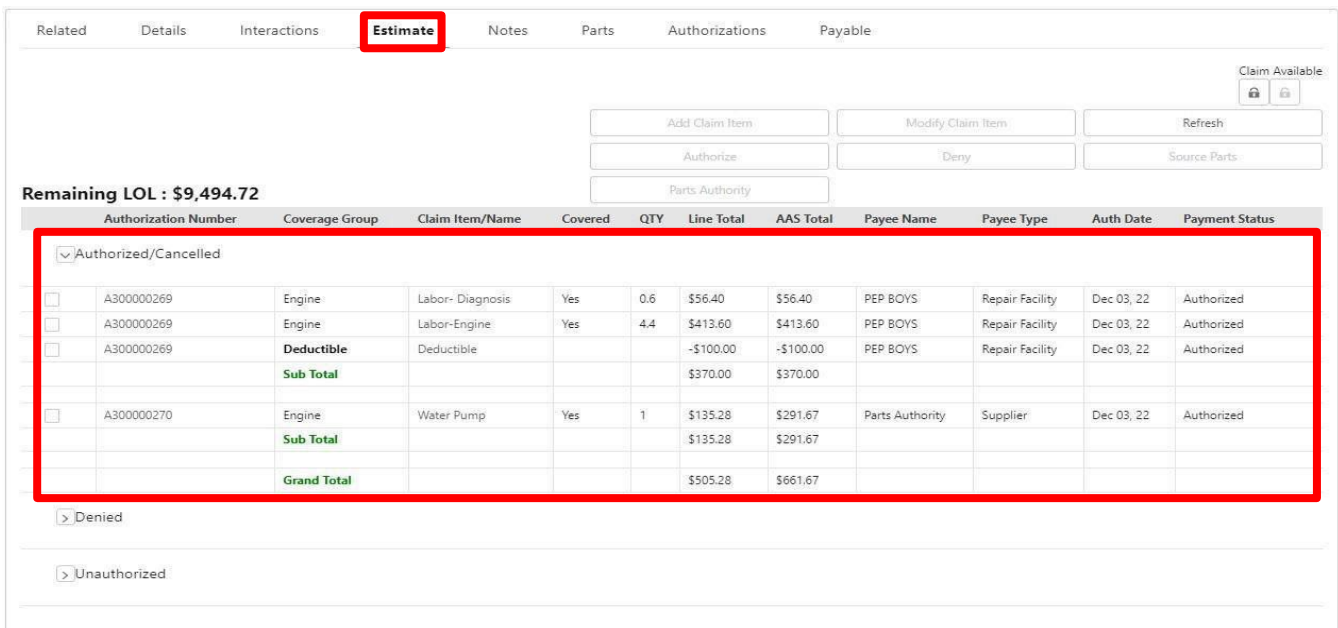
Action	Status	Part Name	Vendor Name	QTY	Part Price	Core	Shipping	Tax	Total	ETA (days)	Condition	Mileage	Warranty	Other	Part Quote Number	Description
<input checked="" type="checkbox"/>	Received	Water Pump	Parts Authority	1	\$135.28				\$135.28	2	OEM Aftermarket		12/12		2112146	water pump

25. A confirm order screen will populate, to complete order you must click **[Save]** to order part.



Part Description	Part Name	Vendor
water pump	Water Pump	Parts Authority

26. To verify part was ordered refresh the claim and click **[Estimate]** tab and click **[Authorized/Cancelled]** section. Where you will now see part order from supplier.



Remaining LOL : \$9,494.72

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
<input checked="" type="checkbox"/>	A300000269	Engine	Labor- Diagnosis	Yes	0.6	\$56.40	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input checked="" type="checkbox"/>	A300000269	Engine	Labor-Engine	Yes	4.4	\$413.60	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
<input checked="" type="checkbox"/>	A300000269	Deductible	Deductible			-\$100.00	PEP BOYS	Repair Facility	Dec 03, 22	Authorized
		Sub Total				\$370.00				
<input checked="" type="checkbox"/>	A300000270	Engine	Water Pump	Yes	1	\$135.28	Parts Authority	Supplier	Dec 03, 22	Authorized
		Sub Total				\$135.28				
		Grand Total				\$505.28				

27. Now go back to step 8-11 and finalize authorization with repair facility.

Verifying Part Ordered Status

28. After an order is placed you will notice the update in Delivery Status information will be blank.

Related

Details

Interactions

Estimate

Notes

Parts

Authorizations

Payable

Add Quote

Re-Source

Order

Refresh

Action	Status	Part Name	Vendor Name	QTY	Part Price	Core	Shipping	Other	Tax	Total	ETA (days)	Delivery Status	Condition	Quote Description
<input checked="" type="checkbox"/> Part(s) Ordered														
<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div> Placed	<div><div></div></div> Alternator	<div><div></div></div> C & K Auto Parts	1	\$503.21		<div><div></div></div>		\$503.21	1		OEM	Alternator
<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div> Placed	<div><div></div></div> Starter Motor	<div><div></div></div> C & K Auto Parts	1	\$320.08		\$52.50		\$372.58	3		OEM	Starter Assembly

29. To get Delivery Status update, **click Drop Down Arrow** next to the placed part and **click Update Delivery Status**.

Important! If any errors pop-up reach out to Vendor Management.

RelatedDetailsInteractionsEstimateNotesPartsAuthorizationsPayable

Add QuoteRe-SourceOrderRefresh

Action	Status	Part Name	Vendor Name	QTY	Part Price	Core	Shipping	Other	Tax	Total	ETA (days)	Delivery Status	Condition	Quote Description
Part(s) Ordered														
<input type="checkbox"/>	<div><div></div><div>Placed</div></div>	<div><div>Alternator</div><div><div></div><div></div></div></div>	<div><div>C & K Auto Parts</div><div><div></div><div></div></div></div>	1	\$503.21					\$503.21	1		OEM	Alternator
<input type="checkbox"/>	<div><div>Edit Order</div><div>Cancel Order</div><div>Parts Resolution</div><div>Update Delivery Status</div></div>	<div><div>Starter Motor</div><div><div></div><div></div></div></div>	<div><div>C & K Auto Parts</div><div><div></div><div></div></div></div>	1	\$320.08		\$52.50			\$372.58	3		OEM	Starter Assembly

30. A pop-up screen will appear with delivery details.

Important! Pay attention to the banner at the top if you have ordered more than one part.

Delivery Status for Engine Assembly with Part Number: 51181

This order may have been split into multiple packages, this tracking information may not be accurate. Please contact vendor support if further information is needed.

Shipping Status

Delivered

Carrier

R&L Carrier

Delivered

☒

Replacement Parts

☒

Account ID

C & K Auto Parts

Close


Shipping Status Detail

This shipment was delivered on 06/16/2023

Tracking Link

897375177



Related	Details	Interactions	Estimate	Notes	Parts	Authorizations	Payable						
					Add Quote Re-Source Order Refresh								
Action	Status	Part Name	Vendor Name	QTY	Part Price	Core	Shipping	Other	Tax	Total	ETA (days)	Delivery Status	Condition
<input checked="" type="checkbox"/> Part(s) Ordered													
<input type="checkbox"/>	<input type="button" value="v"/>	 Placed	 Alternator	 C & K Auto Parts	1	\$330.76	\$39.00	\$52.50		\$408.26	2	 Delivered	OEM
<input type="checkbox"/>	<input type="button" value="v"/>	 Placed	 Engine Assembly	 C & K Auto Parts	1	\$2,938.00	\$610.00	\$175.00		\$3,238.00	3	 Delivered	Remanufactured Powertrain

Date Created 02/28/2022	Created By Johnnie Martinez	Date Approved 3/10/2022	Approved By Jason Dolan	
Date Revised 9/8/2022	Revised by Johnnie Martinez	Revision Description Updated auth note, grammar	Date Approved 9/20/2022	Approved By Jason Dolan
Date Revised 10/10/2022	Revised by Johnnie Martinez	Revision Description Updated auth note screen shot	Date Approved 10/13/2022	Approved By Jason Dolan
Date Revised 12/2/2022	Revised by Johnnie Martinez	Revision Description Updated to new CMS auth process	Date Approved 12/2/2022	Approved By Jason Dolan
Date Revised 6/22/2023	Revised by Johnnie Martinez	Revision Description Added Delivery status update process	Date Approved 6/22/2023 6/28/2023	Approved By Jason Dolan Kara Ness (L&D)
Date Revised 08/01/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Article	Date Approved 08/01/2023	Approved By Amanda Wiseman
Date Revised 05/06/2024	Revised by Araceli Garcia	Revision Description Updated authorization note screen and samples per new SOP process.	Date Approved 5/6/2024	Approved By Jeremy Tan